LSEG Workspace Add-in

Administrator Guide



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About this document

This document describes how to install the LSEG Workspace Add-in within your organisation.

In this guide

The purpose of this document is to outline the relevant installation procedures for the LSEG Workspace Add-in.

Intended readership

This guide is intended for administrators and end users of LSEG Workspace who want to use the new LSEG Workspace Add-in.

Further information

To:

- Request product assistance, contact <u>Support</u>.
- Access other LSEG Workspace technical content, see the Workspace technical documentation site.
- Provide feedback on Workspace technical content, contact <u>DocFeedback@lseg.com</u>.

Pre-requisites

The following facilities must be installed or configured for tools within the menu ribbon to be made available.

Minimum update channel policy and build of Microsoft 365

To use this add-in, you must enable the Current or Monthly update channel of M365.

For more information, including how to change this setting for your organisation or for groups of individuals within your organisation, see the <u>Overview of update channels for Microsoft 365 Apps.</u>

Installing required Microsoft components

To use this add-in, you must install the following application: Microsoft Edge WebView2 Runtime.

Microsoft 365 Trust Center policy settings

Certain groups under the Workspace add-in ribbons contain web-based capabilities. As such, for these capabilities to be made available, the Group and/or Trust Center policies must be set to allow use of Web add-ins, otherwise they do not load. To enable the use of Web add-ins, do the following:

- 1. Open a Microsoft 365 file (Word, Excel, ...).
- 2. Open the File menu.
- 3. Select Options.
- 4. In the Options dialog, select Trust Center.
- 5. Click the **Trust Center Settings...** button.
- 6. Select Trusted Add-in Catalogs.
- 7. Uncheck the Don't allow any web add-ins to start checkbox.

Trust Center	4
Trusted Publishers	Trusted Web Add-in Catalogs
Trusted Documents	Use these settings to manage your web add-in catalogs.
Trusted Add-in Catalogs	Don't allow web add-ins from the Office Store to start.
Add-ins	Next time Office starts, clear all previously-started web add-ins cache.
ActiveX Settings	Trusted Catalogs Table
Macro Settings	You should only add a catalog if you trust its owner. You may also select one of a
Protected View	add-in menu. We will automatically start web add-ins from your insert add-in r dpc menu.

English 🗸

Authenticating with Entra

There are two ways to establish the Entra sign in authentication; one is by using the Sign in button within the LSEG Workspace Office add-ins (performed by the user), and the other is by using the centrally managed System Cross-domain Identity Management (SCIM) provisioning process (performed by the administrator).

- Authenticating using the Sign in button
- Authenticating using Security Cross-domain Identity Management (SCIM)

Authenticating using the Sign in button

★ This procedure is performed by an LSEG Workspace Add-in user.

To authenticate using the Sign in button:

1. Click the Sign-In button within the LSEG Workspace Add-in.

2. Sign in	to Workspace.		-
If you cannot sign in, contact LSEG Support or your Account Team.			LSEG
		n d 6 llan dha maani (🔔 456547
3. Click or	Click here to connect your account a	ind follow the prompts.	Password
Taskpane			Forgotten your password?
LSEG Wor	rkspace X		Sign me in automatically Sign In Cancel
Unable t Microso	to sign-in with your ft account		Incorrect User ID or Password. Please try again. Note: passwords are case-sensitive. If you are trying to sign in for the first time, please use the Welcome Email sent to you.
Your Micro be connect	osoft and Workspace accounts may not ted.		More Help
Click here	to connect your account.		Contact Us Privacy
If you con Workspace Isegworks	tinue to have issues signing in to e, contact us at paceaddin@lseg.com 4. Cliv	ck Connect Microsoft Ac	ccount in the resulting screen.
		😻 LSEG 📑 Microsoft	Enhanced security
		Seamless sign-in with vour Microsoft account	Centralised authentication for better protection and fewer passwords
		You can now use your Microsoft account to sion in to Worksnace.	of Seamless access One sign-in for Workspace and all
		Simplify your workflow with seamless access to all your applications.	Microsoft applications
		Connect Microsoft Account	(*) imposed sperimice Enjoya stronger workflow with fewer Internations
A succe	essful connection will be confirmed by the	e following message:	
Micros	soft account connected		

5. You should now verify your access by repeating the sign in process from the LSEG Workspace Add-In and checking you can access all ribbon buttons.

If account connection has been unsuccessful, click Contact Support from the ribbon.

You can sign in to Workspace with your Microsoft account

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Authenticating using System Cross-domain Identity Management (SCIM)

★ This procedure is performed by an LSEG Workspace Add-in administrator.

For information on the centrally managed SCIM provisioning process, see the provided documentation.

Note that there are several pre-requisites to performing this procedure. For information on these, see the <u>LSEG Entra Workspace</u> <u>Administrators' Activation Guide</u>.

Additional requirements to access deals content sets

To access deals content sets, you must obtain a SDC Platinum add-on to your Workspace license. For more details, contact your Account Team.

Installing the LSEG Workspace Add-in

The LSEG Workspace Add-in can be deployed centrally for all users, or individually per user.

- Deploying the add-in centrally
- Installing the add-in individually

Deploying the add-in centrally

Before you begin, see Determine if Centralized Deployment of add-ins works for your organization.

To deploy the add-in:

In the <u>Microsoft365 admin center</u>, go to the Settings > Add-ins page. If you cannot find the Add-in page, go to the Settings > Integrated apps page and choose Add-ins.

-ins	1	
ploy Add-In	1	
Name 1	Description	
e-share	Universal Outlook plugin	
Microsoft Flow for Excel (Preview)	Automate repetitive tasks by integ	
Refinitiv Add-in	Build your models in Excel using Refin	
	Fins ploy Add-In Name ↑ e-share Microsoft Flow for Excel (Preview) Refinitiv Add-in	

- 2. Select Deploy Add-in at the top of the page, and then click Next.
- 3. Click Choose from the Store.
- 4. Search for LSEG Workspace Add-In or use this link.
- 5. On the next page, select Everyone, Specific users / groups, or Just me to specify to whom the add-in is deployed.
- 6. You can use the Search box to find specific users or groups.
- 7. Select Deploy.



- 8. A green tick appears when the add-in is deployed.
- 9. Follow the on-page instructions to test the add-in¹.
- 10. When finished, click Next.
- 11. If you have deployed the add-in to yourself only, you can select Change who has access to add-in to deploy to more users.

Installing the add-in individually

To install the LSEG Workspace Add-in on your own machine:

- 1. Log in to Office 365 and open an Excel workbook or PowerPoint presentation.
- 2. Click the Insert tab in the navigation bar.
- 3. Select Get Add-ins from the ribbon. The Office Add-Ins window opens.



- 4. Select Store then type LSEG Workspace Add-in into the search tool and press Enter.
- 5. Select Add to start the installation.

When it is done, you will see a new LSEG Workspace tab in the navigation bar.

Important: If you cannot access the Store, your administrator may have blocked third-party add-ins. Go to the My Organization and Admin Managed tabs to check whether the add-in is available for download. If not, contact your IT department and request the whitelisting of the following link for the add-in: <u>https://appsource.microsoft.com/en-us/product/office/WA200008646</u>

¹ You may need to relaunch the Office app to view the add-in icon on the app ribbon.

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